

Basic

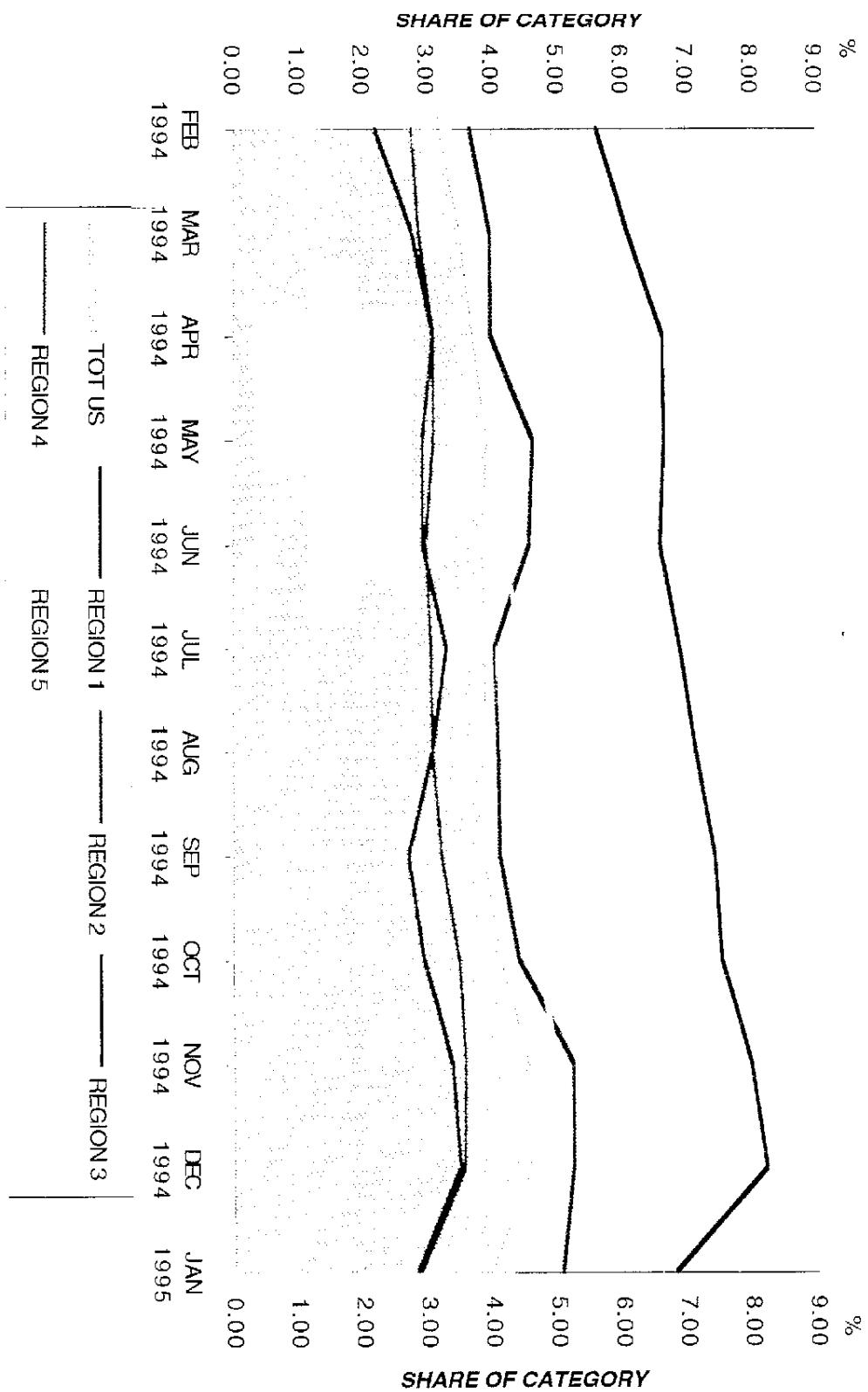
MONTCLAIR INITIATIVE

• FEBRUARY 1995

MONTCLAIR SITUATION ANALYSIS

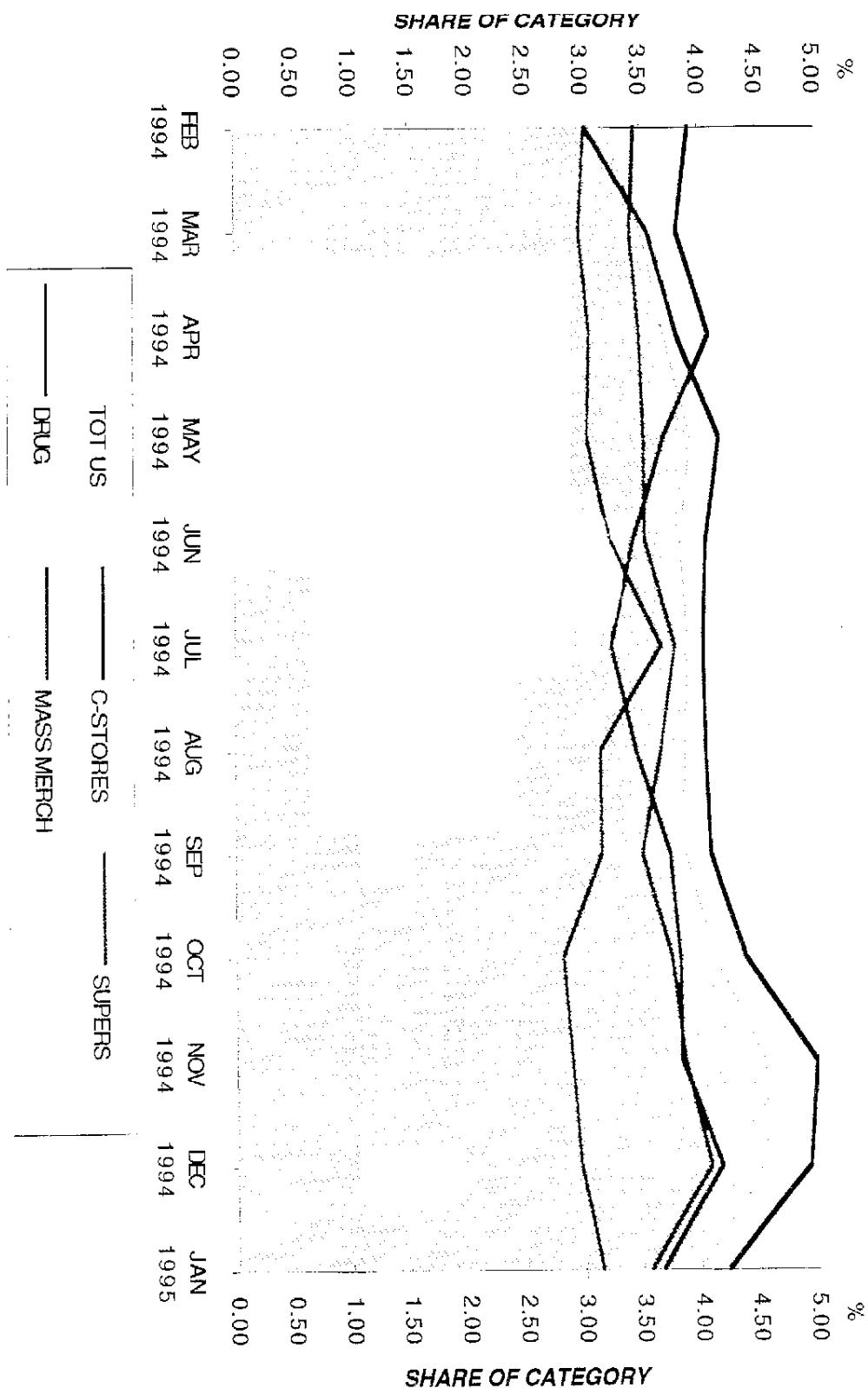
- NATIONALLY, MONTCLAIR SOM/SOC IS DECLINING (JAN '95)
- DECLINING SOM/SOC IN ALL TRADE CLASSES EXCEPT MASS MERCHANTISERS
- GEOGRAPHICALLY, SOC DECLINING IN ALL REGIONS
 - OVERDEVELOPED IN REGIONS 1, 2, AND 5
 - DECLINING IN 7 SECTIONS
 - STABLE IN 7 SECTIONS
 - GROWING IN 8 SECTIONS
- DISTRIBUTION STABLE / DECLINING NATIONALLY (66%)
 - MOST DEVELOPED IN SUPERMARKETS AND MASS MERCHANTISERS (77%)
 - MOST DEVELOPED IN REGION 2 (80%)

MONTCLAIR SOC IS DECLINING EVERYWHERE.



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MONTCLAIR SOC IS DECLINING IN ALL OUTLETS EXCEPT MASS MERCHANTISERS.



Basic

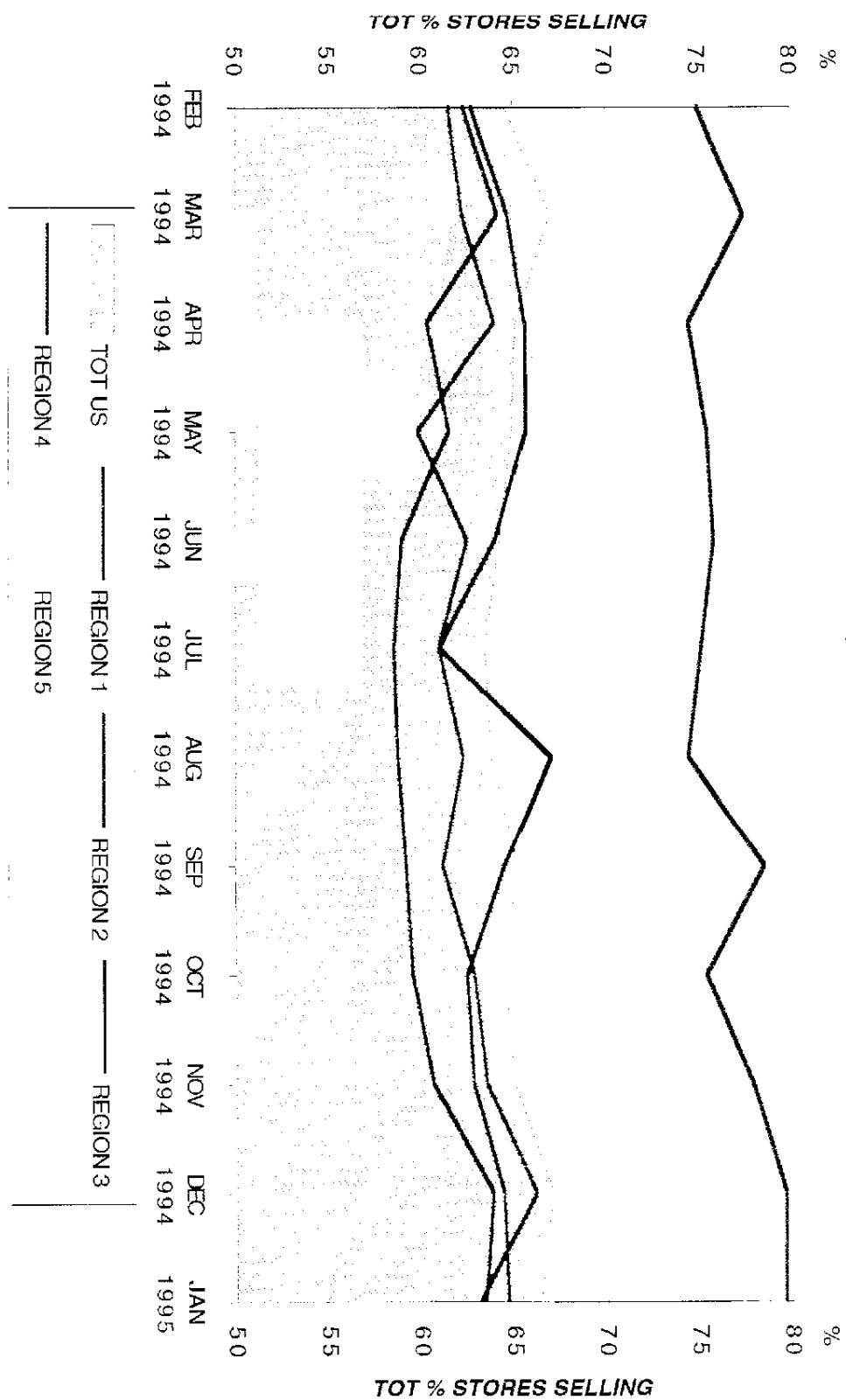
Montclair is highly developed in non-conventional outlets. However, 33% of its volume is contributed by C-Stores

	Share	Avg. Wkly Ctn. Volume	SDI	% Vol. Cont
Supermarket	139	61,580	83	11
Tobacco	5.68	36,118	338	6
Indian Reservation	4.20	26,289	250	4
Liquor	3.41	26,945	203	5
Whsle/Drug	1.44	37,834	85	7
<i>Convenience</i>	1.51	184,077	90	33
Grocery/Rest./other*	1.60	187,345	95	33
Gas	0.88	6,073	53	1
Total	1.68	566,260	100	100

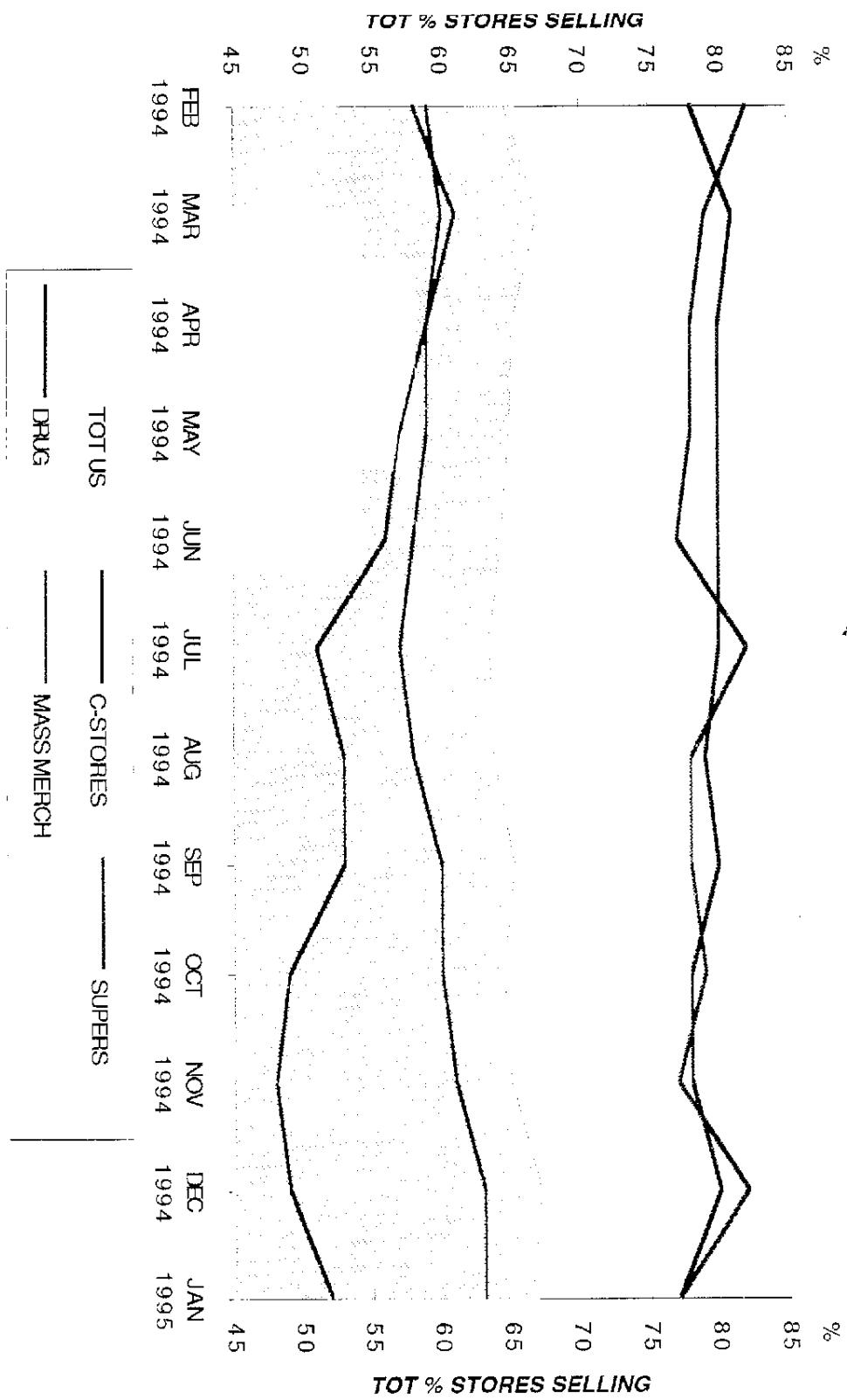
*Other Misc. class of trades, such as Mass Merch., Hotel, Air, etc.

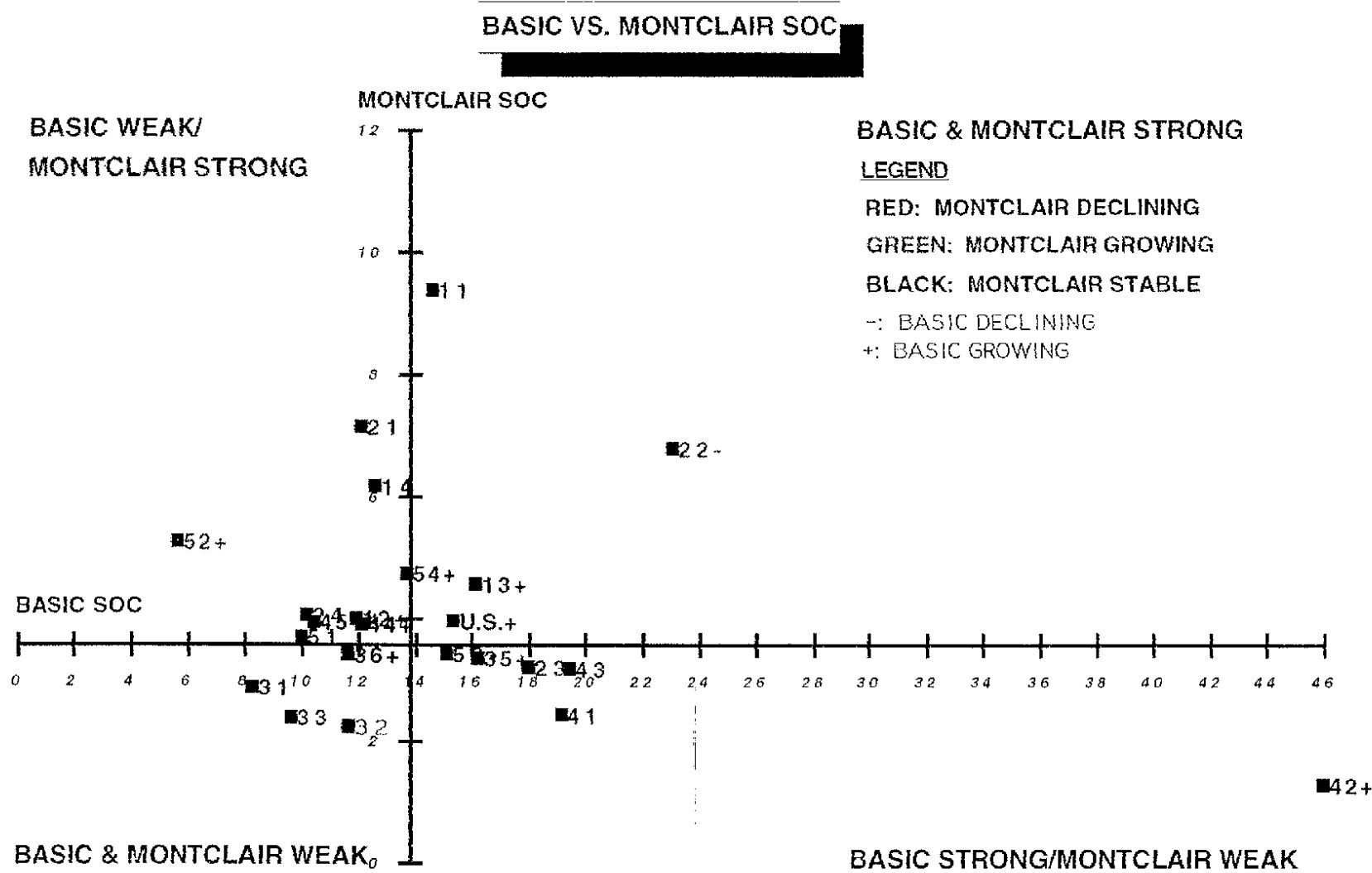
Source: STARS Aggregate Level Database. Data as of 13 weeks ending January 28, 1995

MONTCLAIR DISTRIBUTION IS STABLE IN REGIONS 1 AND 2 AND DECLINING IN REGIONS 3, 4, AND 5.

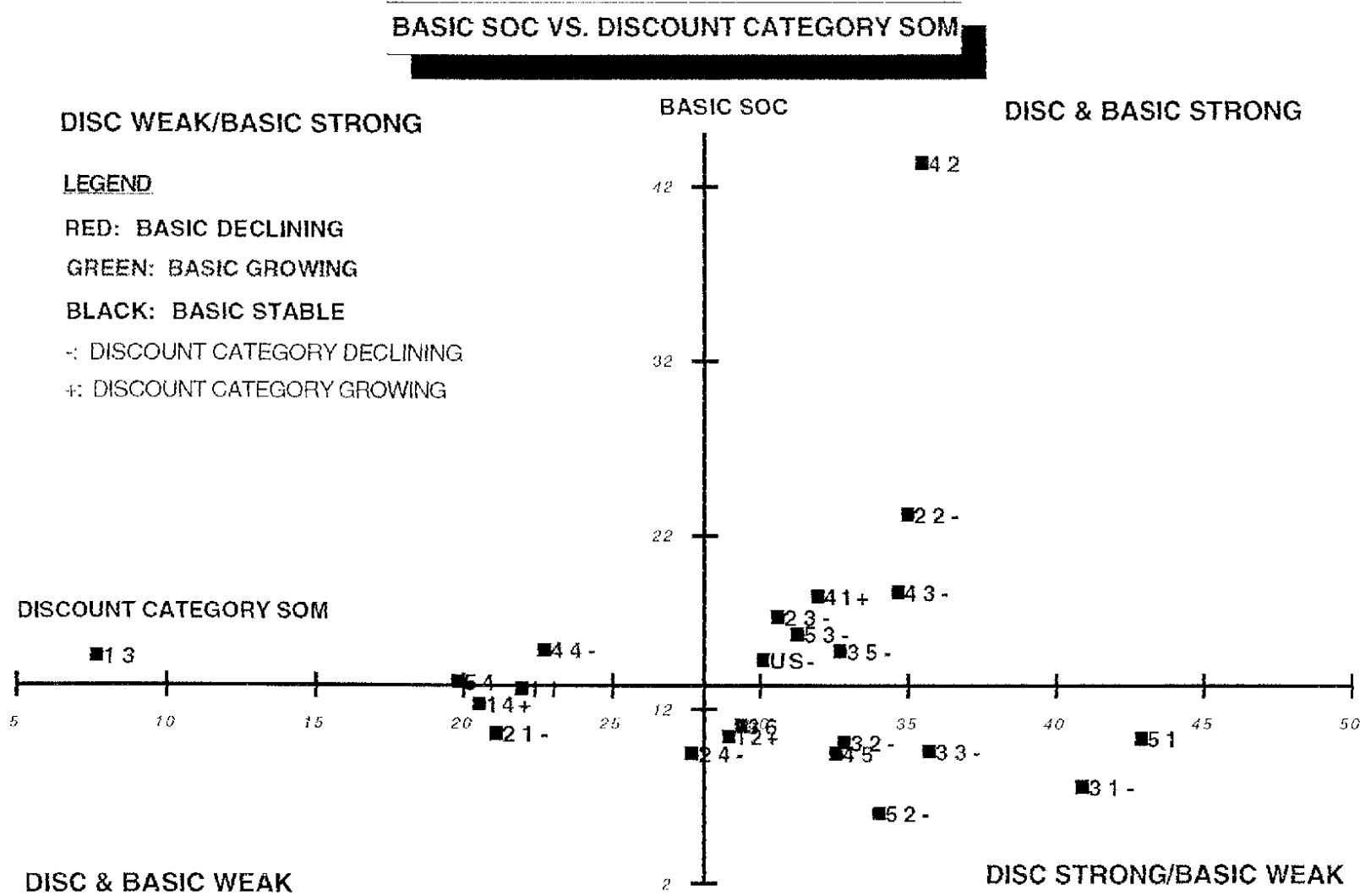


**MONTCLAIR DISTRIBUTION IS DECLINING IN SUPERMARKETS AND MASS MERCHANTIZERS
WHILE IT IS FLAT IN C-STORES AND GROWING IN DRUG STORES.**



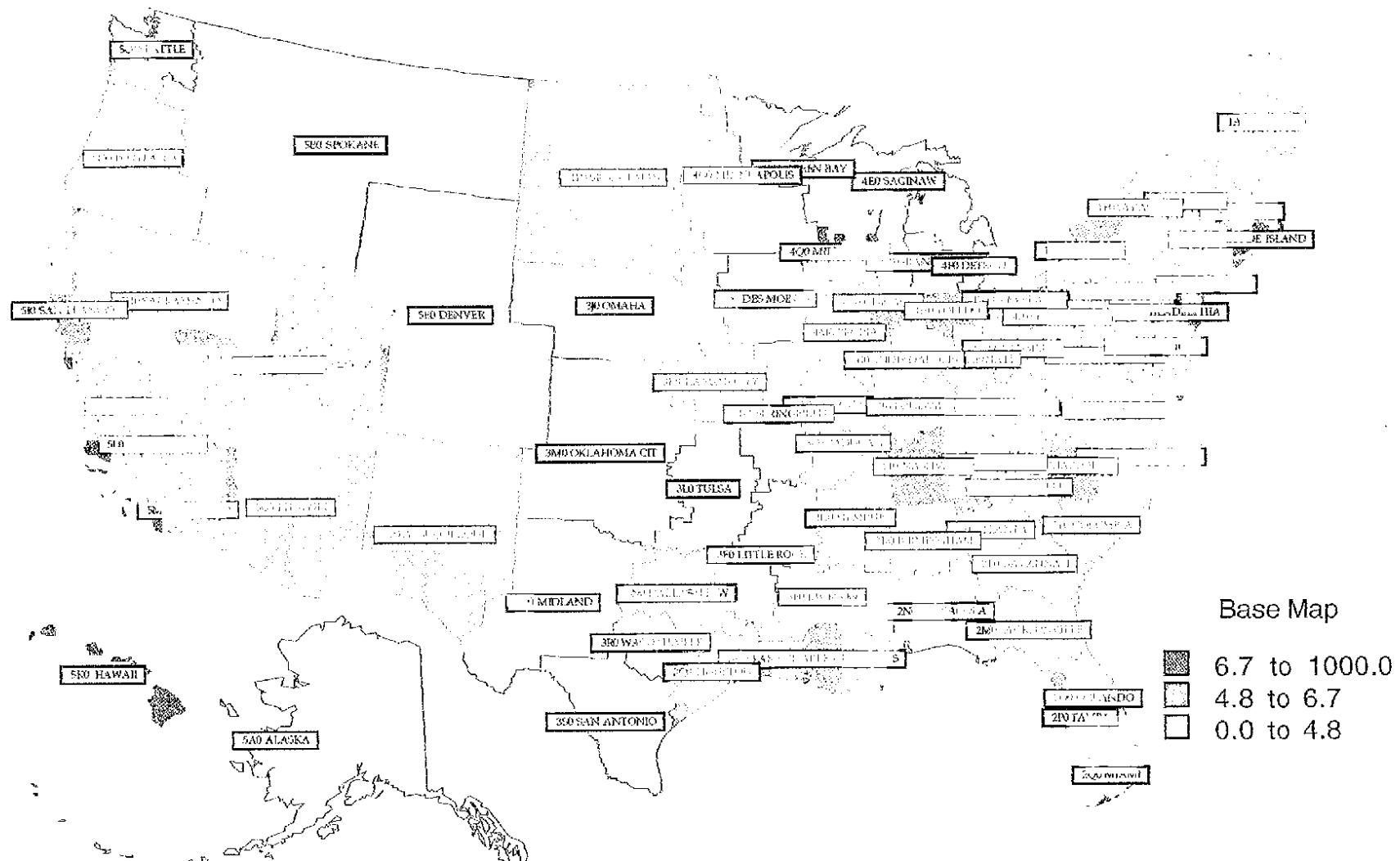


NIELSEN INTEGRATED MONTHLY 1MM - JANUARY 1995



NIELSEN INTEGRATED MONTHLY 1MM - DECEMBER 1994

MONTCLAIR SHARE OF CATEGORY BY MARKET



MSA 3MM - JANUARY 1995